

Weatherization Client File Checklist

All Applicable Forms Must Be Present in the Client File and Must be in the Order Specified Below.

| | |
|-------------------|--|
| Job Number | |
|-------------------|--|

| ODOC State QCI | QCI | Agency | Form # | Description | N/A |
|----------------|-----|--------|---|---|--|
| | | | Photos | Pre/During/Post Photo for each item listed on work plan Pre/Post/In-Progress Lead Safe Work Photos | Photos on Jump Drive, CD, or Electronic <input type="checkbox"/> N/A |
| | | | Form 39 | Client File Checklist | |
| | | | Form 22 | Wx Client Application | |
| | | | Form 26 or 27 | DOE or DHS BWR | |
| | | | Printout | NEAT/MHEA Audit | |
| | | | Printout | NEAT/MHEA Input Report [for QA visits and H&S Justification] | No H&S Justification or QA visit Required <input type="checkbox"/> N/A |
| | | | Receipts | Receipts and Invoices | |
| | | | Form 31 | Hazardous Materials Disposal Verification | No Hazardous Materials Disposed <input type="checkbox"/> N/A |
| | | | Form 28 A or B | Energy Audit Data Collection Form - A - Site Built, B – Mobile | |
| | | | Copy | Work Order and any Change Orders | |
| | | | Copy | Target Blower Door Spreadsheet | |
| | | | Form 44 | Quality Control Report | |
| | | | Form 45 | Energy Audit Checklist | |
| | | | Form 35 | Client Satisfaction Form | |
| | | | Form 48 | Warranties Verification Signature Page | No Warranties <input type="checkbox"/> N/A |
| | | | Form 23 | WX Needs Assessment Priority | |
| | | | Income | Client Income Documentation | |
| | | | Form 30 | Occupant Agreement | |
| | | | Form 29 | Rental Agreement | Home owned by client <input type="checkbox"/> N/A |
| | | | Form 34 | Notarized Certification of Zero Income | All occupants 18yrs+ have income <input type="checkbox"/> N/A |
| | | | Form 36 | Radon Consent Form | Used form provided with Form 22 |
| | | | Pre-ASHRAE | Pre Wx Printout from Residential Energy Dynamics | |
| | | | Post-ASHRAE | Post Wx Printout from Residential Energy Dynamics | |
| | | | Form 42 | Test Kit Documentation | Home newer than 1978 <input type="checkbox"/> N/A |
| | | | Form 43 | Renovation Recordkeeping Checklist | Home newer than 1978 or lead testing negative/not needed <input type="checkbox"/> N/A |
| | | | Form 40 | Certified Renovator on The Job Progress Log | Home newer than 1978 or lead testing <input type="checkbox"/> N/A |
| | | | Form 25 | Client H&S Education Checklist w/Signature | |
| | | | Attachment 35 | Renovate Right Client Signature | Home newer than 1978 or lead testing |
| | | | Form 32 | Mold Disclosure | No Mold suspected or identified <input type="checkbox"/> N/A |
| | | | Form 46 | Insulation Summary Sheet w/attached Insulation Brand Chart | Insulation not installed <input type="checkbox"/> N/A |
| | | | Copy | Copy of Certified Renovator Certification | Home newer than 1978 or lead testing |
| | | | Printout | Third Party Verification of Year Home was Built | |
| | | | Section 106 Review Documentation | SHPO Response indicating that no historic properties are affected. [optional documentation, not required - Form 37, Cover Letter] | Home is less than 45 years or work falls within scope of PA <input type="checkbox"/> N/A |
| | | | Readiness Funding | Form 33, Procurement Documentation, Materials Receipts | See ODOC WPN 22-6 for further documentation |
| | | | Other Agency Forms or Correspondence | Not Required | |